

## Updating the Sponsor

During proposal creation, you will choose the sponsor on the New Proposal Questionnaire. If the incorrect sponsor is chosen, the below are steps to update the proposal.

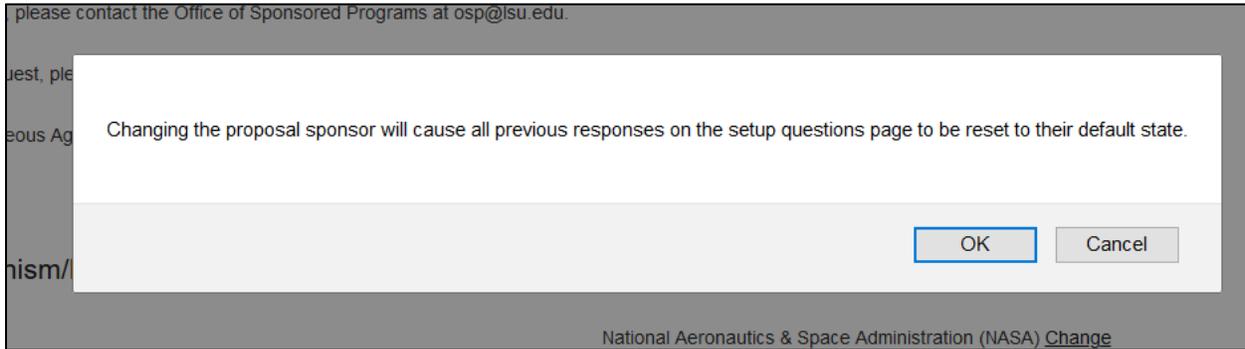
## Proposal Development

- 1) The sponsor name appears at the top of the proposal. On the Setup Questions Tab, click the “change” button next to the sponsor name.

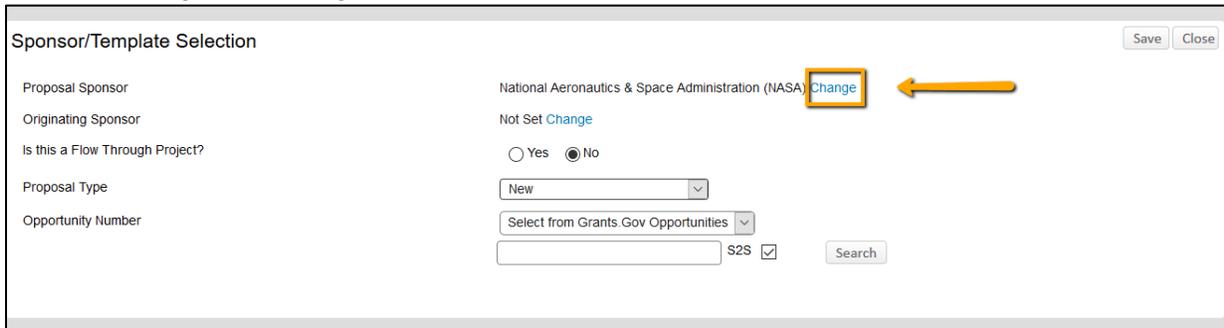


To edit, uncomplete Setup Questions by unchecking box in top right.

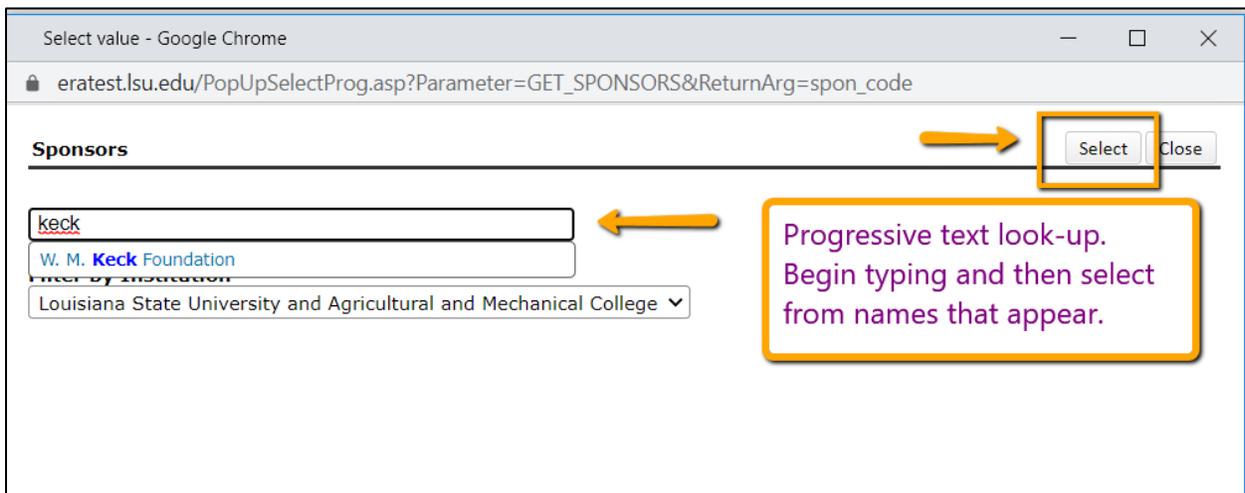
- 2) A warning message will appear letting you know that changing the sponsor will reset all of the setup questions. Click OK.



- 3) A new window will open which allows you to update the Sponsor name. Click the blue "Change" button again.



- 4) A sponsor selection window will open. This is a progressive text look-up. Begin typing sponsor name and then select the sponsor from the names that appear. If the sponsor is not listed choose "Other Sponsor (To Be Added)". Once the new sponsor is chosen, click "Select."

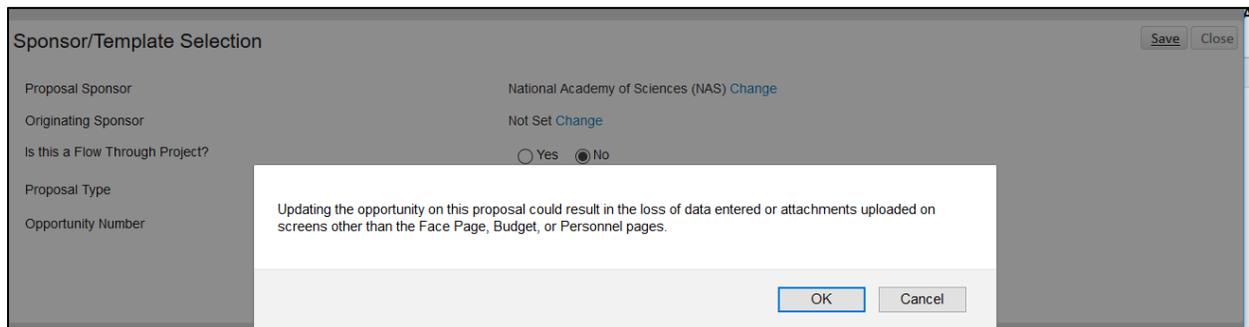


- 5) You will see the updated sponsor name on the Sponsor/Template Selection window. Click Save.



The screenshot shows the 'Sponsor/Template Selection' window. The 'Proposal Sponsor' field is updated to 'W. M. Keck Foundation' with a blue 'Change' link next to it. The 'Originating Sponsor' field is 'Not Set' with a blue 'Change' link. The 'Is this a Flow Through Project?' field has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Proposal Type' field is a dropdown menu set to 'New'. The 'Opportunity Number' field is a dropdown menu set to 'Select from Grants.Gov Opportunities'. There is an 'S2S' checkbox checked and a 'Search' button. In the top right corner, there are 'Save' and 'Close' buttons. Two yellow arrows point to the 'Change' links and the 'Save' button.

- 6) A warning message will appear and let you know that updating the information may result in loss of data. Click OK.



The screenshot shows the 'Sponsor/Template Selection' window with a warning message overlay. The 'Proposal Sponsor' field is updated to 'National Academy of Sciences (NAS)' with a blue 'Change' link. The 'Originating Sponsor' field is 'Not Set' with a blue 'Change' link. The 'Is this a Flow Through Project?' field has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Proposal Type' field is a dropdown menu set to 'New'. The 'Opportunity Number' field is a dropdown menu set to 'Select from Grants.Gov Opportunities'. There is an 'S2S' checkbox checked and a 'Search' button. In the top right corner, there are 'Save' and 'Close' buttons. The warning message overlay is a white box with a grey border, containing the text: 'Updating the opportunity on this proposal could result in the loss of data entered or attachments uploaded on screens other than the Face Page, Budget, or Personnel pages.' At the bottom of the overlay are 'OK' and 'Cancel' buttons.

- 7) The sponsor should be updated at the top of the screen and on the Setup Questionnaire.